

proposed by

1. A method for increasing efficiency of multi-level review of proposed business deals using an organizational management tool, the tool configured with a database of deals and a plurality of authorized reviewers for the deals, said method comprising the steps of:

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a) creating a draft deal for submission to a coordinator;

b) analyzing the deal and selecting a list of reviewers for the deal;

c) forwarding the deal to a next review level;

d) analyzing the deal; and

e) repeating steps c) and d) until a maximum approver accepts or declines the deal.

2. A method according to Claim 1 wherein said step of creating a draft deal for submission to a coordinator further comprises the step of attaching at least one of deal information, a pitch related to the deal, supporting materials for the deal and a cover memo for the deal.

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3. A method according to Claim 1 wherein said step of creating a draft deal for submission to a coordinator further comprises the step of selecting a maximum reviewer for the deal.

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4. A method according to Claim 1 wherein said step of creating a draft deal for submission to a coordinator further comprises the step of notifying a coordinator of the deal.

5. A method according to Claim 1 wherein said step of analyzing the deal and selecting a list of reviewers for the deal further comprises the step of reviewing submitted documents for completeness.

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at least one computer;

a server configured to store a database of proposed business deals and further configured to upload and store submitted deal drafts, upload and store at least one analysis of the deal drafts, upload a list of reviewers for the deal drafts, forward the deal draft to a next named reviewer from the list of reviewers and to upload and store an approval or a declining of the draft deal;

a network connecting said at least one computer to said server; and

a user interface including web pages configured to allow users and reviewers to input and receive information relating to the proposed deals.

16. A system according to Claim 15 wherein said server is further configured to upload and store at least one of a pitch related to the draft deal, supporting materials for the draft deal and a cover memo for the draft deal.

17. A system according to Claim 15 wherein said server is further configured to upload and store a selection of a maximum reviewer for the draft deal.

18. A system according to Claim 15 wherein said server is further configured to notify a coordinator that a draft deal has been submitted.

19. A system according to Claim 15 wherein said server is further configured to upload and store recommendations regarding the draft deal.

20. A system according to Claim 15 wherein said server is further configured to upload and store comments regarding the draft deal.

21. A system according to Claim 15 wherein said server is further configured to upload and store an appended cover memo for the draft deal.

22. A system according to Claim 15 wherein said server is further configured to notify a reviewer of deal drafts to be reviewed and further configured to include links to those deal drafts for review.

23. A system according to Claim 15 wherein said server is further configured to notify a submitter of the draft deal each time a reviewer has uploaded a review.

5 24. A system according to Claim 15 wherein said server is further configured to notify a submitter of the draft deal when a resolution regarding the draft deal has been uploaded.

25. A system according to Claim 15 wherein said server is further configured to store a review status of a draft deal.

26. A system according to Claim 15 wherein said server is further configured to send a delinquency notice to a reviewer.

27. A system according to Claim 15 wherein said server is further configured to limit user capabilities based on stored role information.

28. An electronic boardroom system for facilitating review of business operations, said system comprising:

at least one computer;

5 a server configured to receive and store information relating to the organization within a plurality of databases, including at least one of a proposed deal review database, a business review database, a business reports database, a productivity review database, a portfolio management database, a financial report database, and an employee performance review database and to organize the  
20 information within the databases and report the information to a user for review;

a network connecting said at least one computer to said server; and

a user interface allowing users and reviewers to input and receive information relating to the business from the databases.

25 29. A system according to Claim 28 wherein said server is configured to interface to at least one of the Internet and an Intranet.

30. A system according to Claim 28 wherein said network is one of a wide area network and a local area network.

31. A system according to Claim 28 wherein said server is configured to receive and store at least one role for each authorized user.

5 32. A system according to Claim 31 wherein said server is further configured to limit user capabilities based on stored role information.

33. A system according to Claim 28 wherein said server is configured to notify a system user of items requiring review.

34. A system according to Claim 28 wherein said server is configured to receive and store information regarding a turn-around time required for the review of items.

35. A system according to Claim 28 wherein said server is configured to store at least one of a recommendation and a comment relating to a reviewed item.

36. A system according to Claim 28 wherein said server is configured to receive and store at least one audio comment relating to a reviewed item.

37. A system according to Claim 28 wherein said server is further configured to store and maintain an agenda relating to items received for review.

20 38. A system according to Claim 28 wherein said server is configured to conduct a virtual meeting and provide real-time collaboration between meeting attendees.

39. A system according to Claim 28 wherein said server configured to receive and store information regarding a meeting to be held in an e-center.

25 40. A system according to Claim 28 wherein said server configured with a portfolio management system.

41. A system according to Claim 40 wherein said server configured with matrices for each product within the portfolio, the matrices including key risk factors for each product.

5 42. A system according to Claim 41 wherein said server configured to:

set trigger levels with corrective actions for each key risk factor; and  
monitor the key risk factors on an ongoing basis.

43. A system according to Claim 28 wherein said server is configured to interface with a business development management system.

44. A system according to Claim 43 wherein said server is configured to populate deal review databases and user interfaces with business information received from the business development management system.

45. A method for reviewing business operation using a system configured as an electronic boardroom, the system including a server configured to receive and store information relating to the organization within a plurality of databases, said method comprising the steps of:

maintaining an agenda relating to items received for review.

notifying meeting attendees of pending board virtual meetings;

20 uploading inputs regarding the virtual meeting from each meeting attendee to the server;

notifying meeting attendees of inputs uploaded from other meeting attendees; and

uploading and storing resolutions made by the board regarding the business.

46. A method according to Claim 45 wherein said step of notifying meeting attendees of pending board virtual meetings further comprises the step of searching stored role information of authorized users to determine meeting attendees.

5 47. A method according to Claim 46 wherein said step of searching stored role information of authorized users further comprises the step of limiting user capabilities based on stored role information.

48. A method according to Claim 45 wherein said step of notifying meeting attendees of pending board virtual meetings further comprises the step of notifying a system user of items requiring review.

09710056 "1110000" 49. A method according to Claim 45 wherein said step of notifying meeting attendees of pending board virtual meetings further comprises the step of informing users of a turn-around time required for the review of items.

50. A method according to Claim 45 wherein said step of uploading inputs regarding the virtual meeting further comprises the step of uploading at least one of a recommendation and a comment relating to a reviewed item.

51. A method according to Claim 45 wherein said step of uploading inputs regarding the virtual meeting further comprises the step of uploading at least one audio comment relating to a reviewed item.

20 52. A method according to Claim 45 wherein said step of notifying meeting attendees of inputs uploaded from other meeting attendees further comprises the step of conducting a virtual meeting and providing real-time collaboration between meeting attendees.

25 53. A method according to Claim 45 wherein said step of maintaining an agenda relating to items received for review further comprises the step of interfacing the system with a business development management system.

54. A method according to Claim 45 wherein said step of interfacing the system with a business development management system further

comprises the step of populating deal review databases and user interfaces with business information received from the business development management system.

55. A method for managing a business portfolio using a system including a server configured to receive and store information relating to the organization within a plurality of databases, said method comprising the steps of

uploading matrices for each product within the portfolio including key risk factors to the server;

setting trigger levels with corrective actions for each key risk factor;  
and

monitoring the key risk factors on an ongoing basis.